

**STRATEGI PERTUMBUHAN SISTEM PELABUHAN:
SATU KAJIAN TERHADAP PELABUHAN-PELABUHAN
ACEH DI INDONESIA**

MUHAMMAD SUBHAN

**DOCTOR OF PHILOSOPHY
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**STRATEGI PERTUMBUHAN SISTEM PELABUHAN:
SATU KAJIAN TERHADAP PELABUHAN-PELABUHAN
ACEH DI INDONESIA**

Oleh

MUHAMMAD SUBHAN

**Tesis dikemukakan kepada Kolej Undang-Undang, Kerajaan dan
Pengajian Antarabangsa untuk memenuhi keperluan ijazah Doktor
Falsafah Universiti Utara Malaysia**



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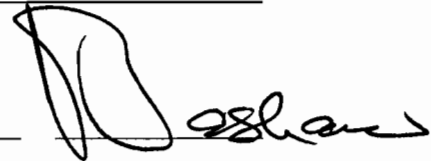
Tarikh: **8 OGOS 2010**
(Date)

Nama Pelajar
(Name of Student) : MUHAMMAD SUBHAN

Tajuk Tesis
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Nama Penyelia/Penyelia-penyelia : DR. AHMAD BASHAWIR HJ ABDUL GHANI



Tandatangan
(Signature)

PENGAKUAN

“Saya akui karya ini adalah hasil kerja saya sendiri kecuali nukilan dan ringkasan yang tiap-tiap satunya telah saya jelaskan sumbernya”

15 Ogos 2010

**Muhammad Subhan
(No Matrik: 91564)**

KEBENARAN MENGGUNA

Dalam membentangkan tesis ini, bagi memenuhi syarat sepenuhnya untuk ijazah Doktor Falsafah (PhD) Universiti Utara Malaysia, saya bersetuju bahawa Perpustakaan Universiti boleh secara bebas membenarkan sesiapa saja untuk memeriksa. Saya juga bersetuju bahawa penyelia saya atau jika tiada kebenaran beliau, Penolong Naib Canselor, diberi kebenaran untuk membuat salinan tesis ini dalam sebarang bentuk, sama ada keseluruhannya atau sebahagiannya, bagi tujuan kesarjanaan. Adalah dimaklumkan bahawa sebarang penyalinan atau penerbitan atau kegunaan tesis ini sama ada sepenuhnya atau sebahagian daripadanya bagi tujuan keuntungan kewangan, tidak dibenarkan kecuali setelah mendapat kebenaran bertulis dari saya. Juga dimaklumkan bahawa pengiktirafan harus diberi kepada saya dan Universiti Utara Malaysia dalam sebarang kegunaan kesarjanaan terhadap sebarang petikan daripada tesis saya.

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Kolej Undang-Undang, Kerajaan dan Pengajian Antarabangsa
Universiti Utara Malaysia
06010 UUM Sintok
Kedah Darul Aman, Malaysia**

ABSTRAK

Tujuan utama kajian ini adalah mengkaji formulasi dan implementasi strategi sistem pelabuhan-pelabuhan di Aceh untuk tumbuh dan berkembang dalam persekitaran industri dan ekonomi global yang berubah cepat dan juga persekitaran industri pelabuhan kawasan Selat Melaka yang berdaya saing tinggi dan mengenal pasti serta memahami strategi-strategi pertumbuhan yang berkesan dan mampan yang dapat diterapkan untuk pelabuhan-pelabuhan di Aceh dan juga di tempat-tempat lainnya yang memiliki ciri-ciri dan keadaan yang serupa dengan pelabuhan-pelabuhan Aceh. Kajian ini didorong oleh kenyataan dan juga hasil ulasan literatur yang mendapati bahawa banyak pelabuhan-pelabuhan regional Indonesia terutama di Aceh mengalami kesukaran untuk tumbuh dan berkembang, padahal pelabuhan-pelabuhan di Aceh sejak dari dahulu lagi telah dikenal mempunyai potensi besar untuk berkembang dan maju menjadi pelabuhan utama di rantau Asia. Namun begitu, kondisi semasa menunjukkan bahawa semua keunggulan yang pernah dimiliki oleh pelabuhan Aceh tidak dapat dipertahankan (*unsustainable*) untuk pertumbuhan. Pelabuhan Aceh sesungguhnya secara pengurusan strategi dapat kita katakan mengalami sindrom "*strategy decay*" untuk tempoh waktu yang cukup lama. Ini dapat disebabkan oleh masalah formulasi strategi yang tidak tepat atau pelaksanaan strategi yang buruk ataupun disebabkan oleh mekanisma pertumbuhan pelabuhan yang tidak jelas, atau kekurangan strategi yang jitu dan pelbagai. Menggunakan kaedah campuran (*mixed method*) yakni gabungan kuantitatif dan kualitatif, kajian ini mengkaji pandangan-pandangan pihak berkuasa pelabuhan Aceh yang dalam hal ini direpresentasikan oleh badan-badan kerajaan, badan autoriti dan pengurusan pelabuhan, perunding pakar dan akademik, dan asosiasi pengguna mengenai kondisi semasa pelabuhan, faktor-faktor yang dipandang menyumbang kepada pertumbuhan pelabuhan, lokasi strategik pelabuhan dan konsep serta pelaksanaan strategi-strategi pelabuhan untuk mencapai pertumbuhan. Hasil kajian menunjukkan bahawa pertumbuhan pelabuhan-pelabuhan Aceh berada dalam kondisi yang kritikal walaupun dipandang masih mempunyai potensi besar untuk tumbuh dan berdaya saing. Oleh itu diperlukan satu transformasi strategi dan urus-tadbir pelabuhan untuk menaikkan daya kompetitif sistem pelabuhan Aceh. Pelabuhan-pelabuhan Aceh mesti dikembangkan sebagai satu sistem yang bersepadu sama ada sebagai bahagian dari rangkaian pengangkutan logistik mahupun sebagai bahagian dari kumpulan pelabuhan. Kajian ini mencadangkan dua lokasi pelabuhan strategik iaitu Sabang dan Lhokseumawe untuk berfungsi sebagai *transshipment* dan *hub* eksport-import. Kajian ini juga mencadangkan beberapa konsep atau model pengembangan pelabuhan Aceh dengan mengambil kira hierarki pelaksanaan strategi pertumbuhan pada setiap peringkat daya saing.

ABSTRACT

The main objective of this study is to investigate the characteristics of Aceh's ports and their contributions to the regional port industries, and to develop strategic approaches to better position those ports in the dynamic and competitive environment along the Malacca strait. This study is motivated by the facts that ports in Aceh have had difficulties to compete with other regional ports, despite their strategic position along the world busiest shipping lane of the Malacca strait. Using a mixed method that is a combination of quantitative and qualitative approach, this study examines perspectives from relevant parties such as government officials, port authorities and managements, experts, academicians and consultants, and port user associations. Data and information are analysed using SWOT concentrating on the conditions of the ports, perceived factors contributing to port growth, port strategic location, and implementation of the concepts and strategies for port growth. In particular, this study focuses on business aspects of the ports while to a lesser extent also highlights political motivations of the ports stakeholders. The findings show that it is critical to totally reform the ports' strategic development and operation in order to achieve sustainable competitive advantage and growth. In addition, Aceh ports should be developed as an integrated port system, taking into consideration the concept of ports as both an element of logistic chain system and as a member in a port group that serves same hinterlands. This study suggests the use of Sabang and Lhokseumawe as the transshipment and hub ports for Aceh, while all other Aceh ports should be developed based on consistent strategic plannings as the supporting ports for the main terminal ports in Sabang and Lhokseumawe. Through these strategic approaches, Aceh ports will be able to accelerate the achievement of its ultimate goal of having the same level playing field with other main ports in the region.

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DAFTAR KANDUNGAN

| | |
|----------------------------------|-------|
| PENGAKUAN | iii |
| KEBENARAN MENGGUNA | iv |
| ABSTRAK | v |
| <i>ABSTRACT</i> | vi |
| PENGHARGAAN | vii |
| PENERBITAN BAHAGIAN TESIS | ix |
| DAFTAR KANDUNGAN | x |
| SENARAI JADUAL | xvi |
| SENARAI RAJAH | xx |
| SENARAI SINGKATAN | xxiii |

Muka Surat

BAB 1 PENDAHULUAN

| | | |
|-------|---|----|
| 1.1 | Latar Belakang Kajian | 1 |
| 1.2 | Pernyataan Masalah Kajian | 8 |
| 1.3 | Tujuan Kajian | 18 |
| 1.4 | Persoalan Kajian | 19 |
| 1.5 | Signifikan Kajian | 20 |
| 1.5.1 | Sumbangan kepada keilmuan | 23 |
| 1.5.2 | Sumbangan kepada pembuat dasar dan praktisi | 24 |
| 1.6 | Kerangka Konsep | 25 |
| 1.7 | Kaedah Penyelidikan | 26 |
| 1.7.1 | Kaedah ulasan literatur | 28 |
| 1.7.2 | Reka bentuk kajian | 29 |
| 1.8 | Skop Kajian | 32 |
| 1.9 | Organisasi Tesis | 34 |
| 1.10 | Kesimpulan | 36 |

BAB 2 PELABUHAN ACEH: DAHULU DAN PEMBANGUNAN SEMASA

| | | |
|-------|---|----|
| 2.1 | Pengenalan | 38 |
| 2.2 | Sejarah Singkat Pembangunan Pelabuhan Aceh | 41 |
| 2.3 | Pembangunan Pelabuhan di Indonesia | 49 |
| 2.4 | Aceh dalam Industri Kepelabuhanan di Indonesia | 55 |
| 2.4.1 | Aspek perundangan pembangunan pelabuhan | 57 |
| 2.4.2 | Undang-undang khas untuk Aceh | 59 |
| 2.5 | Aceh dan Pelabuhan-pelabuhan di Kawasan Selat Melaka | 61 |
| 2.6 | Lokasi dan Data Fizikal Pelabuhan | 65 |
| 2.7 | Masalah Pertumbuhan Pelabuhan | 67 |
| 2.8 | Perkembangan Perdagangan dan Komoditinya | 69 |
| 2.9 | Pembangunan Ekonomi dan Infrastruktur <i>Hinterland</i> | 80 |
| 2.10 | Isu-isu Semasa mengenai Pembangunan Pelabuhan | 83 |
| 2.11 | Kesimpulan | 85 |

BAB 3 ULASAN LITERATUR

| | | |
|-------|--|-----|
| 3.1 | Pengenalan | 87 |
| 3.2 | Beberapa Takrifan dalam Bidang Kepelabuhanan | 88 |
| 3.3 | Pembangunan Kepelabuhanan | 92 |
| 3.3.1 | Pelabuhan dan negara-negara pelabuhan | 96 |
| 3.3.2 | <i>Hinterland</i> | 98 |
| 3.3.3 | <i>Shipper</i> dan <i>carrier</i> | 102 |
| 3.3.4 | Pembangunan pelabuhan <i>hub</i> atau <i>transshipment</i> | 104 |
| 3.4 | Persaingan dan Strategi Pertumbuhan Pelabuhan | 107 |
| 3.5 | Transformasi dalam Urus-tadbir Pelabuhan | 109 |
| 3.6 | Daya Saing dan Kerjasama antara Pelabuhan | 112 |
| 3.7 | Literatur Kepelabuhanan di Indonesia | 118 |
| 3.8 | Kesimpulan | 120 |

BAB 4 KERANGKA TEORITIKAL

| | | |
|-------|--|-----|
| 4.1 | Pengenalan | 122 |
| 4.2 | Pertumbuhan dan Strategi | 126 |
| 4.3 | Pandangan Pengurusan terhadap Strategi dan Pertumbuhan | 130 |
| 4.3.1 | Pandangan berasaskan sumber | 130 |
| 4.3.2 | Kompetensi | 132 |
| 4.3.3 | Penguasaan pasaran | 135 |
| 4.3.4 | Penguasaan peluang | 138 |
| 4.3.5 | Kerjasama atau perikatan strategik | 141 |
| 4.3.6 | Keunggulan kompetitif | 143 |
| 4.4 | Membangun Strategi Pertumbuhan | 148 |
| 4.5 | Elemen-elemen Kerangka Konseptual Strategi Pertumbuhan | 152 |
| 4.6 | Kesimpulan | 156 |

BAB 5 METODOLOGI PENYELIDIKAN

| | | |
|--------|--------------------------------------|-----|
| 5.1 | Pengenalan | 158 |
| 5.2 | Kaedah Kajian | 159 |
| 5.3 | Justifikasi Kaedah Kajian | 161 |
| 5.4 | Susun Atur Kajian | 167 |
| 5.5 | Reka Bentuk Penyelidikan | 169 |
| 5.5.1 | Soal selidik | 171 |
| 5.5.2 | Temubual | 175 |
| 5.5.3 | Perbincangan <i>focus group</i> | 177 |
| 5.5.4 | Pemerhatian lapangan | 179 |
| 5.5.5 | Data sekunder | 179 |
| 5.5.6 | Reka bentuk persampelan | 181 |
| 5.5.7 | Pemilihan unit analisis | 185 |
| 5.5.8 | Prosedur dan teknik pengumpulan data | 188 |
| 5.5.9 | Triangulasi | 192 |
| 5.5.10 | Prosedur analisis data kuantitatif | 195 |

| | | |
|--------|-----------------------------------|-----|
| 5.5.11 | Prosedur analisis data kualitatif | 197 |
| 5.5.12 | Ujian rintis | 197 |
| 5.6 | Kebolehpercayaan dan Kesahan | 199 |
| 5.6.1 | Kesahan kuantitatif | 200 |
| 5.6.2 | Kesahan kualitatif | 201 |
| 5.6.3 | Kebolehpercayaan | 203 |
| 5.7 | Isu-isu Etika dan Kerahsiaan | 206 |
| 5.8 | Kesimpulan | 209 |

BAB 6 STRATEGI PERTUMBUHAN PELABUHAN: ANALISIS DAN DAPATAN KAJIAN

| | | |
|-------|--|-----|
| 6.1 | Pengenalan | 211 |
| 6.2 | Responden, Kadar Respon dan Nilai Kebolehpercayaan | 213 |
| 6.3 | Analisis Deskriptif | 216 |
| 6.4 | Analisis SWOT Pelabuhan Aceh | 223 |
| 6.4.1 | Kekuatan | 226 |
| 6.4.2 | Kelemahan | 229 |
| 6.4.3 | Peluang | 234 |
| 6.4.4 | Ancaman | 237 |
| 6.5 | Analisis Faktor | 241 |
| 6.5.1 | Faktor-faktor sumber | 244 |
| 6.5.2 | Faktor-faktor kompetensi | 249 |
| 6.5.3 | Faktor-faktor pasar | 253 |
| 6.5.4 | Faktor-faktor peluang | 256 |
| 6.5.5 | Faktor-faktor kerjasama | 259 |
| 6.5.6 | Faktor-faktor daya saing | 262 |
| 6.6 | Faktor-faktor Pertumbuhan Pelabuhan: analisis kualitatif | 266 |
| 6.6.1 | Faktor-faktor sumber | 266 |
| 6.6.2 | Faktor-faktor kompetensi | 269 |
| 6.6.3 | Faktor-faktor pasar | 273 |
| 6.6.4 | Faktor-faktor peluang | 278 |

| | | |
|--------|--|-----|
| 6.6.5 | Faktor-faktor kerjasama | 283 |
| 6.6.6 | Faktor-faktor daya saing | 285 |
| 6.7 | Analisis Pemilihan Lokasi | 291 |
| 6.7.1 | Berdasarkan data kuantitatif | 291 |
| 6.7.2 | Berdasarkan data kualitatif | 292 |
| 6.8 | Analisis Pemilihan Strategi | 299 |
| 6.8.1 | Visi pembangunan pelabuhan | 300 |
| 6.8.2 | Pendekatan kuantitatif | 304 |
| 6.8.3 | Pendekatan kualitatif | 308 |
| 6.9 | Pemilihan Strategi: proses analisis berperingkat (AHP) | 313 |
| 6.9.1 | Prosedur AHP | 314 |
| 6.9.2 | Kriteria pemilihan strategi | 319 |
| 6.9.3 | Penilaian alternatif strategi | 321 |
| 6.9.4 | Hierarki strategi pertumbuhan | 327 |
| 6.10 | Sistem Pelabuhan | 330 |
| 6.10.1 | Pelabuhan sebagai satu unsur dalam sistem rantai | 331 |
| 6.10.2 | Pelabuhan dalam sistem kumpulan pelabuhan | 333 |
| 6.11 | Kesimpulan | 336 |

BAB 7 STRATEGI PERTUMBUHAN PELABUHAN: PERBINCANGAN

| | | |
|-------|--|-----|
| 7.1 | Pengenalan | 342 |
| 7.2 | Visi Pembangunan Pelabuhan | 343 |
| 7.3 | Trend dan Senario dalam Industri Kepelabuhanan | 348 |
| 7.4 | Pemahaman Keunggulan Kompetitif | 355 |
| 7.5 | Beberapa Faktor Penyumbang Pertumbuhan Pelabuhan | 360 |
| 7.5.1 | Enam faktor pertumbuhan pelabuhan | 362 |
| 7.5.2 | Lokasi strategik | 368 |
| 7.5.3 | Peranan pasaran domestik dan antarabangsa | 371 |
| 7.5.4 | Jaringan logistik daratan | 372 |
| 7.5.5 | Perikatan dengan pihak perkapalan | 374 |
| 7.5.6 | Keunggulan kompetitif Pelabuhan | 375 |

| | | |
|------|---|-----|
| 7.6 | Pertumbuhan Pelabuhan dalam Satu Sistem | 376 |
| 7.7 | Perbincangan mengenai Lokasi Pelabuhan | 381 |
| 7.8 | Model Pembangunan Pelabuhan | 387 |
| 7.9 | Sistem Urus-tadbir Pelabuhan | 397 |
| 7.10 | Memilih strategi yang sesuai | 399 |
| 7.11 | Kesimpulan | 403 |

BAB 8 KESIMPULAN

| | | |
|-------|--|-----|
| 8.1 | Pengenalan | 405 |
| 8.2 | Kesimpulan Soalan Kajian | 406 |
| 8.2.1 | Potensi dan hambatan pertumbuhan pelabuhan | 406 |
| 8.2.2 | Faktor atau komponen pertumbuhan pelabuhan | 409 |
| 8.2.3 | Lokasi strategik pelabuhan | 413 |
| 8.2.4 | Strategi pertumbuhan & model pembangunan pelabuhan | 414 |
| 8.3 | Implikasi kepada Teori | 418 |
| 8.4 | Implikasi kepada Dasar dan Amalan | 422 |
| 8.5 | Catatan Penutup | 425 |

| | |
|---|-----|
| RUJUKAN | 428 |
| LAMPIRAN A Borang soal selidik | 466 |
| LAMPIRAN B Surat penyelidikan dari Universiti Utara Malaysia | 486 |
| LAMPIRAN C Surat penyelidikan dari Pemerintah Aceh | 487 |

SENARAI JADUAL

| | | |
|--------------------|--|-----|
| Jadual 2.1 | Perkembangan Pelabuhan Komersil di Pulau Sumatera dan Jawa, 2004-2008 | 51 |
| Jadual 2.2 | Senarai 25 Pelabuhan Strategik di Indonesia | 52 |
| Jadual 2.3 | Perkembangan panjang dermaga pelabuhan yang dikelola PT. Pelabuhan Indonesia (Pelindo) | 53 |
| Jadual 2.4 | Perkembangan jumlah kapal yang merapat di pelabuhan yang dikelola PT. Pelabuhan Indonesia (Pelindo) | 54 |
| Jadual 2.5 | Perkembangan jumlah kargo yang dipunggah-muat di pelabuhan yang dikelola PT. Pelabuhan Indonesia (Pelindo) | 54 |
| Jadual 2.6 | Perkembangan jumlah truput kontena di pelabuhan yang dikelola PT. Pelabuhan Indonesia (Pelindo) | 54 |
| Jadual 2.7 | Pelabuhan-pelabuhan utama di kawasan Selat Melaka | 62 |
| Jadual 2.8 | Kegiatan truput Pelabuhan Singapura dan tempat-tempat lain di dunia | 64 |
| Jadual 2.9 | Perbandingan kegiatan dan pertumbuhan truput di beberapa pelabuhan utama di Asia Tenggara dan kejirannya | 64 |
| Jadual 2.10 | Data fizikal beberapa pelabuhan komersil di Aceh | 66 |
| Jadual 2.11 | Data fizikal beberapa pelabuhan non-komersil di Aceh | 66 |
| Jadual 2.12 | Perkembangan eksport non-migas di Sumatera | 72 |
| Jadual 2.13 | Perkembangan import non-migas di Sumatera | 73 |
| Jadual 2.14 | Neraca perdagangan Aceh | 73 |
| Jadual 2.15 | Neraca perdagangan Indonesia | 74 |
| Jadual 2.16 | Kelompok komoditi eksport dan import utama Aceh tahun 2007 | 77 |
| Jadual 2.17 | Eksport Indonesia menurut jenis komoditi | 78 |
| Jadual 2.18 | Import Indonesia menurut jenis komoditi | 79 |
| Jadual 2.19 | Perkembangan eksport Indonesia menurut negara tujuan | 80 |
| Jadual 2.20 | Perkembangan import Indonesia menurut negara asal | 80 |
| Jadual 3.1 | Model Pentadbiran Pelabuhan menurut Baird | 110 |
| Jadual 3.2 | Rangkuman kajian-kajian kepelabuhanan di Indonesia | 119 |

| | | |
|--------------------|--|-----|
| Jadual 5.1 | Empat paradigma atau <i>worldview</i> | 160 |
| Jadual 5.2 | Penggunaan kaedah kajian dalam kajian-kajian sebelumnya | 166 |
| Jadual 5.3 | Beberapa kriteria untuk menilai keperluan temubual bersemuka | 167 |
| Jadual 6.1 | Jumlah responden dan kadar respon | 215 |
| Jadual 6.2 | Hasil uji kebolehpercayaan alat pengukuran | 215 |
| Jadual 6.3 | Responden berdasarkan asal institusi tempat bekerja | 217 |
| Jadual 6.4 | Responden berdasarkan posisi atau jawatan | 218 |
| Jadual 6.5 | Responden berdasarkan jantina | 219 |
| Jadual 6.6 | Responden berdasarkan umur dan lama pengalaman kerja | 220 |
| Jadual 6.7 | Responden berdasarkan latar belakang keilmuan yang dimiliki | 220 |
| Jadual 6.8 | Responden berdasarkan kualifikasi akademik yang dimiliki | 221 |
| Jadual 6.9 | Responden berdasarkan wawasan industri kepelabuhanan | 222 |
| Jadual 6.10 | Keseluruhan komponen dan nilai dalam analisis SWOT | 225 |
| Jadual 6.11 | Item-item ' <i>posisi geografi pelabuhan</i> ' | 227 |
| Jadual 6.12 | Item-item ' <i>kemudahan sokongan</i> ' | 227 |
| Jadual 6.13 | Item-item ' <i>sumber kewangan</i> ' | 228 |
| Jadual 6.14 | Semua item yang menyumbang kepada kekuatan | 229 |
| Jadual 6.15 | Item-item ' <i>kompetensi dan kapabiliti pelabuhan</i> ' | 230 |
| Jadual 6.16 | Item-item ' <i>jenis & kualiti khidmat pelabuhan</i> ' | 231 |
| Jadual 6.17 | Item-item ' <i>terminal & dermaga pelabuhan</i> ' | 231 |
| Jadual 6.18 | Item-item ' <i>sistem informasi pelabuhan</i> ' | 232 |
| Jadual 6.19 | Semua item yang menyumbang kepada kelemahan | 233 |
| Jadual 6.20 | Item-item ' <i>peluang pengembangan pelabuhan</i> ' | 235 |
| Jadual 6.21 | Semua item yang menyumbang kepada peluang | 236 |
| Jadual 6.22 | Item-item ' <i>persaingan pelabuhan</i> ' | 238 |
| Jadual 6.23 | Item-item ' <i>industri & pasaran pelabuhan</i> ' | 238 |
| Jadual 6.24 | Item-item ' <i>kerjasama dan pakatan</i> ' | 239 |
| Jadual 6.25 | Semua item yang menyumbang kepada ancaman | 239 |
| Jadual 6.26 | Total Variance yang dijelaskan untuk analisis sumber | 246 |
| Jadual 6.27 | Loading analisis faktor untuk komponen sumber | 247 |
| Jadual 6.28 | Nilai koefisien <i>Alpha</i> untuk pengukuran sumber | 248 |
| Jadual 6.29 | Total variance dijelaskan untuk analisis kompetensi | 250 |

| | | |
|--------------------|---|-----|
| Jadual 6.30 | Loading analisis faktor untuk komponen kompetensi | 251 |
| Jadual 6.31 | Nilai koefisien <i>Alpha</i> untuk pengukuran kompetensi | 252 |
| Jadual 6.32 | KMO and Bartlett's Test untuk faktor pasar | 253 |
| Jadual 6.33 | Total <i>variance</i> dijelaskan untuk analisis pasar | 254 |
| Jadual 6.34 | Loading analisis faktor untuk komponen pasar | 255 |
| Jadual 6.35 | Nilai koefisien <i>Alpha</i> untuk pengukuran pasar | 256 |
| Jadual 6.36 | Total <i>variance</i> yang dijelaskan untuk analisis peluang | 257 |
| Jadual 6.37 | Loading analisis faktor untuk komponen peluang | 258 |
| Jadual 6.38 | Nilai koefisien <i>Alpha</i> untuk pengukuran peluang | 259 |
| Jadual 6.39 | KMO and Bartlett's Test untuk faktor kerjasama | 260 |
| Jadual 6.40 | Total <i>variance</i> dijelaskan untuk analisis kerjasama | 261 |
| Jadual 6.41 | Loading analisis faktor untuk komponen kerjasama | 262 |
| Jadual 6.42 | Nilai koefisien <i>Alpha</i> untuk pengukuran kerjasama | 262 |
| Jadual 6.43 | KMO and Bartlett's Test untuk faktor daya saing | 263 |
| Jadual 6.44 | Total <i>variance</i> dijelaskan untuk analisis daya saing | 264 |
| Jadual 6.45 | Loading analisis faktor untuk komponen daya saing | 265 |
| Jadual 6.46 | Nilai koefisien <i>Alpha</i> untuk pengukuran | 265 |
| Jadual 6.47 | Pemilihan lokasi pelabuhan utama berdasarkan peringkat | 292 |
| Jadual 6.48 | Visi pembangunan pelabuhan mengikut kepentingan | 301 |
| Jadual 6.49 | Penilaian visi menurut ranking | 302 |
| Jadual 6.50 | Motif pembangunan pelabuhan mengikut kepentingan | 303 |
| Jadual 6.51 | Kepentingan setiap alternatif strategi | 305 |
| Jadual 6.52 | Penilaian alternatif strategi menurut ranking | 305 |
| Jadual 6.53 | Kepentingan setiap alternatif strategi | 306 |
| Jadual 6.54 | Kekerapan dipilih antara alternatif strategi | 307 |
| Jadual 6.55 | Matriks penilaian berpasangan untuk kriteria strategi | 319 |
| Jadual 6.56 | Matriks normalisasi untuk kriteria strategi | 320 |
| Jadual 6.57 | Matriks penilaian berpasangan strategi menurut kriteria kesesuaian | 321 |
| Jadual 6.58 | Matriks normalisasi strategi menurut kriteria kesesuaian | 321 |
| Jadual 6.59 | Matriks penilaian berpasangan strategi menurut kriteria kebolehterimaan | 323 |

| | | |
|--------------------|---|-----|
| Jadual 6.60 | Matriks normalisasi strategi menurut kebolehterimaan | 323 |
| Jadual 6.61 | Matriks penilaian berpasangan strategi menurut kriteria kebolehlaksanaan | 324 |
| Jadual 6.62 | Matriks normalisasi strategi menurut kebolehlaksanaan | 325 |
| Jadual 6.63 | Matriks penilaian berpasangan strategi menurut kriteria kemampanan | 326 |
| Jadual 6.64 | Matriks normalisasi strategi menurut kriteria kemampanan | 326 |
| Jadual 6.65 | Penilaian akhir secara keseluruhan untuk alternatif strategi | 329 |
| Jadual 6.66 | Kepentingan sistem rangkaian logistik | 332 |
| Jadual 6.67 | Aplikasi sistem rangkaian logistik di pelabuhan Aceh | 332 |
| Jadual 6.68 | Sistem hubungan antara pelabuhan di Aceh | 335 |
| Jadual 7.1 | Perbandingan keunggulan kompetitif tiga negara Selat Melaka | 358 |
| Jadual 7.2 | Perbandingan dokumen yang diperlukan dalam pelaksanaan eksport dan import dari tiga negara Selat Melaka | 358 |
| Jadual 7.3 | Beberapa ciri semulajadi sistem pelabuhan Aceh | 387 |

SENARAI RAJAH

| | | |
|-------------------|---|-----|
| Rajah 1.1 | Kerangka konsep kajian | 26 |
| Rajah 2.1 | Pelabuhan-pelabuhan utama di bawah PT Pelindo 1 | 63 |
| Rajah 2.2 | Nilai eksport dan import non-migas Aceh | 70 |
| Rajah 2.3 | Nilai eksport non-migas Aceh menurut benua tujuan | 70 |
| Rajah 2.4 | Total eksport dan import Aceh | 71 |
| Rajah 2.5 | Nilai eksport dan import Aceh | 74 |
| Rajah 2.6 | Perkembangan eksport dan import non-migas Aceh | 75 |
| Rajah 2.7 | Nilai eksport dan import Indonesia 1983-2008 | 76 |
| Rajah 2.8 | Nilai eksport dan import Indonesia 2004-2008 | 76 |
| Rajah 3.1 | Kawasan fungsional pelabuhan sebagai rantaian pengangkutan dilihat dari pengurusan pelabuhan | 91 |
| Rajah 3.2 | Rantaian pengangkutan dari kapal ke hinterland dengan sistem baj | 100 |
| Rajah 3.3 | Rantaian pengangkutan dari kapal ke hinterland dengan sistem rel | 101 |
| Rajah 3.4 | Rantaian pengangkutan dari kapal ke hinterland dengan sistem trak | 101 |
| Rajah 3.5 | Metodologi perbandingan lokasi pelabuhan transshipment baru | 106 |
| Rajah 4.1 | Membuat agenda kompetensi utama | 133 |
| Rajah 4.2 | Posisi Matrik Daya Saing berasaskan Kapabiliti | 135 |
| Rajah 4.3 | Keuntungan dan pertumbuhan dari membuat pasaran baru | 138 |
| Rajah 4.4 | Matriks tentang peluang-peluang yang tidak tereksploitasi | 140 |
| Rajah 4.5 | Kitaran sebuah keunggulan kompetitif | 145 |
| Rajah 4.6 | Strategi Generik | 146 |
| Rajah 4.7 | Elemen-elemen dalam strategi berasaskan daya saing | 152 |
| Rajah 4.8 | Elemen-elemen dalam strategi berasaskan kerjasama | 153 |
| Rajah 4.9 | Elemen-elemen dalam strategi berasaskan kompetensi | 154 |
| Rajah 4.10 | Elemen-elemen dalam strategi berasaskan sumber | 154 |

| | | |
|-------------------|--|-----|
| Rajah 4.11 | Elemen-elemen dalam strategi berasaskan penguasaan pasaran | 155 |
| Rajah 4.12 | Elemen-elemen dalam strategi berasaskan penguasaan peluang | 155 |
| Rajah 4.13 | Kerangka konseptual pertumbuhan sistem pelabuhan | 156 |
| Rajah 5.1 | Kerangka kerja penyelidikan | 170 |
| Rajah 5.2 | Carta alir proses pengumpulan data | 192 |
| Rajah 5.3 | Reka bentuk triangulasi serentak | 195 |
| Rajah 5.4 | Carta alir proses analisis data kuantitatif | 196 |
| Rajah 5.5 | Carta alir proses analisis data kualitatif | 197 |
| Rajah 6.1 | Matriks untuk analisis SWOT | 223 |
| Rajah 6.2 | Matriks analisis SWOT umum industri pelabuhan Aceh | 224 |
| Rajah 6.3 | Gambar <i>Scree Plot</i> untuk analisis faktor komponen sumber | 245 |
| Rajah 6.4 | Gambar <i>Scree Plot</i> untuk analisis faktor komponen kompetensi | 249 |
| Rajah 6.5 | Gambar <i>Scree Plot</i> untuk analisis faktor komponen pasar | 254 |
| Rajah 6.6 | Gambar <i>Scree Plot</i> untuk analisis faktor komponen peluang | 257 |
| Rajah 6.7 | Gambar <i>Scree Plot</i> untuk analisis faktor komponen kerjasama | 261 |
| Rajah 6.8 | Gambar <i>Scree Plot</i> untuk analisis faktor komponen daya saing | 263 |
| Rajah 6.9 | Pandangan responden tentang lokasi dan posisi pelabuhan utama | 299 |
| Rajah 6.10 | Analisis strategi pertumbuhan pelabuhan menurut data kualitatif | 313 |
| Rajah 6.11 | Kerangka konsep penilaian AHP untuk strategi pertumbuhan | 315 |
| Rajah 6.12 | Struktur AHP untuk strategi pertumbuhan pelabuhan di Aceh | 317 |
| Rajah 6.13 | Matriks perhitungan berat nilai kriteria | 317 |
| Rajah 6.14 | Ranking kepentingan kriteria strategi | 320 |
| Rajah 6.15 | Ranking strategi menurut kriteria kesesuaian | 322 |
| Rajah 6.16 | Ranking strategi menurut kriteria kebolehterimaan | 324 |
| Rajah 6.17 | Ranking strategi menurut kriteria kebolehlaksanaan | 325 |
| Rajah 6.18 | Ranking strategi menurut kriteria kemampanan | 327 |
| Rajah 6.19 | Ranking strategi keseluruhan menurut semua kriteria | 330 |
| Rajah 6.20 | Pelabuhan sebagai satu bagian dari sistem rantai pengangkutan kargo | 331 |
| Rajah 6.21 | Posisi pelabuhan-pelabuhan dalam kawasan kajian | 334 |
| Rajah 6.22 | Hubungan antara pelabuhan dalam sistem pelabuhan Aceh | 334 |
| Rajah 7.1 | Peta kawasan dalam kerjasama IMT-GT | 346 |

| | | |
|-------------------|---|-----|
| Rajah 7.2 | Distribusi jumlah kapal kontena menurut umur pada Mac 2010 | 349 |
| Rajah 7.3 | Keadaan semasa kapal kargo dan kapasitinya pada Mac 2010 | 350 |
| Rajah 7.4 | SWOT umum berdasarkan komponen-komponen | 361 |
| Rajah 7.5 | SWOT gabungan faktor (tiada komponen) | 361 |
| Rajah 7.6 | Posisi sistem pelabuhan Aceh di persimpangan jalur pelayaran dunia | 369 |
| Rajah 7.7 | Posisi sistem pelabuhan Aceh diapit oleh 2 negara gergasi ekonomi dunia | 369 |
| Rajah 7.8 | Pelabuhan sebagai satu elemen dari sistem rantai logistik | 377 |
| Rajah 7.9 | Pelabuhan sebagai satu korporasi dalam sistem rantai pengangkutan | 378 |
| Rajah 7.10 | Hubungan sistem rantai logistik antara pelabuhan & hinterland | 379 |
| Rajah 7.11 | Jarak tempuh laut antara Pelabuhan Sabang dengan beberapa pelabuhan penghubung | 386 |
| Rajah 7.12 | Model Pembangunan Pelabuhan dengan Permintaan Eksport dan Import (Model 1) | 388 |
| Rajah 7.13 | Model Pembangunan Pelabuhan Eksport-Import dengan Kegiatan Pemprosesan dan Eksport-semula (Model 2) | 390 |
| Rajah 7.14 | Model Pembangunan Pelabuhan dengan Permintaan Transshipment/hub (Model 3) | 391 |
| Rajah 7.15 | Model Pembangunan Pelabuhan dengan Model Kombinasi (Model 4) | 393 |
| Rajah 7.16 | Pelabuhan Sabang sebagai pelabuhan transshipment dan eksport-import (Model 5) | 394 |
| Rajah 7.17 | Pelabuhan Sabang sebagai pelabuhan transshipment dan Pelabuhan Lhokseumawe sebagai pelabuhan eksport-import (Model 6) | 395 |
| Rajah 7.18 | Lokasi, fungsi, dan hubungan pelabuhan dengan hinterland | 396 |
| Rajah 7.19 | Kekuatan pemicu strategi pertumbuhan sistem pelabuhan | 399 |
| Rajah 7.20 | Model strategi pertumbuhan menurut prioriti dan waktu | 402 |
| Rajah 8.1 | Kerangka dan model strategi pertumbuhan | 420 |

SENARAI SINGKATAN

| | |
|----------------|---|
| 3PL | Third Party Logistics Providers |
| ADB | Asian Development Bank |
| AHP | Analytic Hierarchy Process |
| APEC | Asia Pacific Economic Cooperation |
| ASEAN | Association of South East Asian Nations |
| BAPPEDA | Badan Perencanaan Pembangunan Daerah |
| BPKS | Badan Pengusahaan Kawasan Sabang |
| BPPS | Badan Pengusahaan Daerah Perdagangan & Pelabuhan Bebas Sabang |
| BPS | Badan Pusat Statistik Republik Indonesia |
| BRR | Badan Rehabilitasi dan Rekonstruksi Aceh dan Nias |
| BUMN | Badan Usaha Milik Negara |
| COSCO | China Ocean Shipping (Group) Company |
| Dephub | Departemen Perhubungan Republik Indonesia |
| Dishub | Dinas Perhubungan [Provinsi Aceh] |
| DKI | Daerah Khusus Ibukota [Provinsi Jakarta] |
| DKP | Departemen Kelautan dan Perikanan Republik Indonesia |
| DWT | Deadweight Tonnes |
| EDI | Electronic Data Interchange |
| FEU | Forty-foot Equivalent Unit |
| FPZ | Free Port Zone |
| FTZ | Free Trade Zone |
| GAM | Gerakan Aceh Merdeka |
| GDP | Gross Domestic Products |
| IDR | Indonesian Rupiah |
| IFC | International Finance Corporation |
| IMO | International Maritime Organization |
| IMT-GT | Indonesia-Malaysia-Thailand Growth Triangle |
| INPRES | Instruksi Presiden Republik Indonesia |

| | |
|------------------|--|
| KADIN | Kamar Dagang dan Industri (<i>Chamber of Commerce</i>) |
| KAPET | Kawasan Pengembangan Ekonomi Terpadu |
| KMO | Kaiser-Meyer-Olkin [pengukuran, ujian] |
| LWS | Low Water Springs atau Low Water at Spring Tide |
| M&A | Mergers & Acquisitions |
| Migas | Minyak dan Gas |
| MOT | Ministry of Transportation Malaysia |
| MoU | Memorandum of Understanding |
| MPA | Maritime and Port Authority of Singapore |
| MSC | Mediterranean Shipping Company |
| PCA | Principal Component Analysis |
| PDRB | Produk Domestik Regional Bruto |
| PELINDO | Pelabuhan Indonesia [syarikat] |
| PEMKO | Pemerintah Kota |
| PP | Peraturan Pemerintah Republik Indonesia |
| PSA | Port of Singapore Authority (PSA) International Pte Ltd |
| PT | Perseroan Terbatas [bentuk syarikat] |
| PTP | Pelabuhan Tanjung Pelepas Malaysia |
| RTR | Rencana Tata Ruang |
| R&D | Research and Development |
| SDM | Sumber Daya Manusia |
| SHI | Samsung Heavy Industries |
| SISTRANAS | Sistem Transportasi Nasional Indonesia |
| SPSS | Statistical Package for Social Sciences |
| SWOT | Strength-Weakness-Opportunity-Threat [analisis] |
| TATRALOK | Tatanan Transportasi Lokal |
| TATRANAS | Tatanan Transportasi Nasional |
| TATRAWIL | Tatanan Transportasi Wilayah |
| TEU | Twenty-foot Equivalent Unit |
| TMSP | Tatanan Makro Strategis Perhubungan |
| TNC | Trans-National Corporations |
| TSS | Traffic Separation Scheme |

| | |
|----------------|--|
| UKC | Under-Keel Clearance |
| UNCTAD | United Nations Conference on Trade and Development |
| UNDP | United Nations Development Programme |
| UNESCAP | United Nations Economic & Social Commission for Asia and the Pacific |
| USA | United States of America |
| USD | US Dollar |
| UU | Undang-Undang Republik Indonesia |
| VLCC | Very Large Crude Carrier |
| WFP-LSU | World Food Programme – Logistics Support Unit |
| WTO | World Trade Organization |

BAB 1

PENDAHULUAN

“Dialah (Allah) yang menjalankan kamu di darat dan di laut (dengan diberi kemudahan menggunakan pelbagai jenis kenderaan) sehingga apabila kamu berada di dalam kapal, dan kapal itu pula bergerak laju membawa muatan-muatannya dengan tiupan angin yang baik, dan mereka pun bersukacita dengannya...”

(Al-Qur'an, Surah Yunus: 22)

1.1 Latar Belakang Kajian

“If one does not know to which port one is sailing, no wind is favorable.”

Lucius Annaeus Seneca (c. 4 BC – AD 65)

Dalam beberapa dekad terakhir, dunia telah pun menyaksikan perubahan yang cepat dan ketara dari pergerakan perdagangan global dan juga peningkatan luar biasa terhadap keperluan barangan atau apa yang diperkatakan sebagai ‘*globalizing marketplace*’ oleh Robinson (2002) atau apa yang dimaksud sebagai ‘globalisasi logistik pelabuhan’ menurut istilah UNCTAD (2008, 2007). Kenyataan ini terutama sekali dipacu oleh kepesatan pertumbuhan penduduk dunia, permintaan tinggi dan terus meningkat terhadap barangan, dan peningkatan kesejahteraan ekonomi serta penemuan baru (inovasi) dalam bidang teknologi maritim dan pengangkutan serta logistik.

Dalam proses globalisasi tersebut, pelabuhan laut, sebagaimana dinyatakan oleh UNCTAD (2008, 2007), Alderton (2005), dan UNESCAP (2005), memainkan peranan yang sangat penting dalam perdagangan maritim dan pengangkutan logistik yang mana peranan serta kepentingannya akan terus kekal di masa depan. Pelabuhan

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